Section 6: Toolkit Guidance

Contents

What is a Toolkit?

To translate research findings into policy and practice, the Agency for Healthcare Research and Quality (AHRQ) and its grantees or contractors occasionally decide to create toolkits based on their work.

- A "toolkit" is a collection of related information, resources, or tools that together can guide users to develop a plan or organize efforts to follow evidence-based recommendations or meet evidence-based specific practice standards.

- A "tool" is an instrument (e.g., survey, guidelines, or checklist) that helps users accomplish a specific task that contributes to meeting a specific evidence-based recommendation or practice standard.

Toolkits provide action-oriented guidance for practitioners or policymakers to apply the research to their work. This document outlines considerations for developing effective toolkits, and includes a series of checklists described below.

Toolkit Checklists and How They Help You

The checklists provided should help the toolkit developer(s) and AHRQ reviewers in designing and checking the final product under a grant or contract with AHRQ. Three checklists will help you with the overall toolkit:

- The first checklist ("Is This a Toolkit?") is used to determine if a toolkit is the right method to disseminate your research. Throughout your project, revisit this checklist to see if the results of the research continue to fit the toolkit frame.

- The second checklist (Tool Content Checklist) will help you develop the toolkit's contents once you decide on the toolkit format. This list looks at the type of information you should present in a toolkit and how to highlight critical versus supplementary information. Answer the content checklist questions for your toolkit and tools to determine whether you have provided users with sufficient information to implement the changes in behavior that your research recommends.

- The third checklist (Toolkit Usability Checklist) will assist your team in thinking about the framework for your research-based tools—target users, toolkit style, and the function of each tool. The checklist also prompts your team to consider validating the toolkit with its intended audience, steering users to additional information, and measuring the impact of the toolkit.

A fourth checklist (Tool Checklist) is useful for the entire toolkit but is intended for individual tools. This checklist addresses organization, design, and language. It provides more detail and will aid your team in creating a set of tools that is consistent, making each easier to navigate and use.

- Cohesive and logical organization helps users navigate the tool, improves comprehension, and encourages use. Answer the questions in the Organization Considerations section to determine how successfully your toolkit aids users in finding and using the information presented.

- Each tool should conform to the AHRQ Publishing and Communications Guidelines. The guidelines ensure a consistent look and feel across materials. You may want to consider consulting with a graphic designer who can assist with layout and incorporating graphic elements into the toolkit. Examine the questions in the Design Considerations section to determine if you can improve the tool's look and usability.

- Clear and concise language aids in communicating your message. Use the Language Considerations section to ensure your grammar and word choice are appropriate for the tool. You may also consider having an editor review the product to ensure these considerations are addressed.

In the planning stages and during the production process, review each of the four checklists with your team to ensure that you provide users with a product that includes all critical information. Fill out the four checklists for the entire toolkit, and for each individual tool contained in the checklist, complete checklist four (see Table 1). To proceed, make sure you have answered "yes" to each item in the checklists. If you answer "somewhat" or "no" to any of the items, brainstorm with your team about how to resolve any concerns.

Table 1—Checklists To Use With Your Toolkit and Tools

	Toolkit	Tool
1. "Is This a Toolkit?" Checklist	✓	
2. Toolkit Content Checklist	✓	
3. Toolkit Usability Checklist	✓	
4. Tool Checklist	✓	✓

Here are the four checklists.

1. "Is This a Toolkit?" Checklist
A "toolkit" is a collection of related information, resources, or tools that together can guide users to develop a plan or organize efforts to follow evidence-based recommendations or meet evidence-based specific practice standards.   Toolkits are effective for presenting action-oriented recommendations, but they are not appropriate for all research. At the beginning of your project, and throughout the process, address these checklist questions to determine if a toolkit is the proper way to share your research findings.   To proceed with a toolkit format, make sure you have answered "yes" to each item in the checklist. If you answer "no" to any of the items, brainstorm with your team about how to resolve any concerns. You may also want to consider pursuing another stand-alone product, such as a research paper or a fact sheet.

1. What behavior or action are you trying to promote? _____ _____ _____	
2. Why is a package of tools the best way to attain your goal (as opposed to a research paper, fact sheet, or other stand-alone product? _____ _____ _____	
3. Have you verified that a product like this does not already exist?	❑ Yes ❑ No
4. Did your research generate multiple action-oriented tools (such as specific procedures, protocols, or other structured activities) that, working together, can help users develop a plan or organize efforts to conform to evidence-based practice?	❑ Yes ❑ No
5. Have you spoken to potential users to determine the demand for a product like this one? How do you know there's a demand? What research or data supports this demand? _____ _____ _____	❑ Yes ❑ No

2. Toolkit Content Checklist

Toolkits should have a standard format and look as well as similar types of information to easily guide users through a process of change. Answer the content checklist questions for your toolkit and tools to determine if you have provided users with sufficient information to implement the changes in behavior that your research recommends.

To proceed, make sure you have answered "yes" to each item in the checklist. If you answer "no" to any of the items, brainstorm with your team about how to resolve any concerns.

1.	Are the toolkit and tools based on tasks?	❑ Yes	❑ No
▪	Does the toolkit provide sequential steps users should follow?	❑ Yes	❑ No
▪	Does the toolkit provide examples of how others have used the toolkit or tools successfully?	❑ Yes	❑ No
2.	Does the first page of the toolkit state its purpose?	❑ Yes	❑ No
3.	Does the first page of the toolkit explain how to use the toolkit?	❑ Yes	❑ No
4.	Does the first page of the toolkit list each tool and its purpose?	❑ Yes	❑ No
5.	Does the first page of the toolkit describe target users and address their differing goals in using the toolkit (see Toolkit Overview Checklist)?	❑ Yes	❑ No
6.	Do the tools provide necessary information regarding what users need to complete tasks, such as: – Staff time. – Staff skills. – Materials. – Equipment. – Administrative clearances and approvals.	❑ Yes	❑ No
7.	Does the toolkit organize resources to achieve a goal through specific actions (assign responsibilities, create a schedule, document progress, and ensure accountability)?	❑ Yes	❑ No
8.	Does each tool give adequate instruction on how to use it (e.g., collect and analyze data, interpret results, implement suggestions, and assess impact)?	❑ Yes	❑ No
9.	Does the toolkit provide users with additional resources for more information?	❑ Yes	❑ No

3. Toolkit Usability Checklist
Think deliberately about the toolkit and its components: the potential users, the users' goals, the toolkit's look, expert validation, and measures of success. This checklist will help you and your team to plan a well-designed, usable toolkit.   To proceed, make sure you have answered "yes" to each item in the checklist. If you answer "no" to any of the items, brainstorm with your team about how to resolve any concerns or consider pursuing an alternative method for disseminating your research results.[1]

Users

1. Have you identified your target group of users and taken them into account when designing the toolkit? How? _____ _____ _____ _____	❑ Yes ❑ No
2. Is there more than one target group of users?	❑ Yes ❑ No
▪ Will they have different goals? ▪ What are some of those goals? _____ _____	❑ Yes ❑ No
3. Have you explained how different users can adapt the toolkit to suit their needs?	❑ Yes ❑ No
4. What tasks do you want users to accomplish with each tool? **Tool** **Goal** A. B. C. D. E. F.	
5. Are target users familiar with the toolkit's concepts and terminology?	❑ Yes ❑ No

Style

1. How is this toolkit presented?
    ❑ Web site   ❑ Printed Document
    ❑ Video   ❑ Audio
    ❑ Other: ❑ Slide presentations	

▪ AHRQ has style guides for many different kinds of presentations that include information elements, such as font size, typeface, and color. Does the toolkit comply with *AHRQ Publishing and Communications Guidelines* for that presentation style?	❑ Yes ❑ No
2. Layering, or page sequence, in a Web-based environment reflects the hierarchy of organization in a document. Primary information is on the first level, and secondary information is on the second level of the Web site. ▪ If your toolkit is Web based, does your critical information appear on the primary level?	❑ Yes ❑ No ❑ Not Applicable

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[1] For question 2, if there is only one target group, the answer will be "no" and the subsequent two questions are not applicable.

▪ Is your secondary information linked so it is supplementary to the first level of information?	❑ Yes ❑ No ❑ Not Applicable
3. Does the toolkit as a whole have a cohesive, AHRQ-branded look and follow the design specifications laid out in the *AHRQ Publishing and Communications Guidelines*?	❑ Yes ❑ No

Testing and Evaluation

1. Will the toolkit be tested before it is published?	❑ Yes ❑ No

▪ How will the toolkit be tested?
    ❑ Expert review   ❑ Focus groups with users
    ❑ Usability testing ❑ Other:	

2. How can users measure the impact of the toolkit within their organization? What are the measures of success? (Suggest 3–5 methods of impact measurement.) _____ _____ _____	

Implementation

1. If the toolkit requires updates, will you, the developers, perform those updates?	❑ Yes ❑ No ❑ Not Applicable
2. If the toolkit is a Web site and has the capacity to serve as a "live" resource for users (e.g., communities of practice for those with shared interests, bulletin boards, networking sites), which organization will provide ongoing quality oversight and technical support? _____ _____ _____	

4. Tool Checklist		
This checklist addresses three areas: organization, design, and language.		
To proceed, make sure you have answered "yes" to each item in the checklist. If you answer "somewhat" or "no" to any of the items, brainstorm with your team about how to resolve any concerns.		

Organization Considerations

Cohesive and logical organization helps users navigate the tool, improves comprehension, and encourages use. Answer the questions in this section to determine how successfully your toolkit aids users in finding and using the information presented.

1. Does the tool have an advance organizer, such as a table of contents or site map?	❑ Yes ❑ No	
▪ Does the advance organizer provide a coherent, complete "big picture" view of the tool?	❑ Yes ❑ No ❑ Somewhat	
2. Does the tool have an organizational hierarchy and a clear structure of main topics and subtopics?	❑ Yes ❑ No ❑ Somewhat	
▪ Restricting your hierarchy to fewer than five levels makes it easier for users to navigate the tool. Does the tool have fewer than five levels in the hierarchy?	❑ Yes ❑ No	
▪ Is the hierarchy maintained throughout the tool?	❑ Yes ❑ No ❑ Somewhat	
3. Is the tool structure based on tasks?	❑ Yes ❑ No ❑ Somewhat	
4. Does the tool have headings (this can apply to printed documents, Web-based documents, presentations, etc.)?	❑ Yes ❑ No	
▪ Are sections or headings arranged in a logical order? Do they clearly describe the contents of the sections they cover?	❑ Yes ❑ No ❑ Somewhat	
▪ Do the paragraphs relate to the headings? (Do they contain information users would expect to find under each heading?)	❑ Yes ❑ No ❑ Somewhat	
▪ Does each section identify the appropriate user?	❑ Yes ❑ No ❑ Somewhat	
5. Are there clear cross references to other sections, research, tools, or toolkits (e.g. Web hyperlinks)?	❑ Yes ❑ No ❑ Somewhat	

Design Considerations

Each tool should conform to the AHRQ Publishing and Communications Guidelines to ensure a consistent look and feel across materials. You may want to consider consulting with a graphic designer who can assist with layout and incorporating graphic elements. Examine the questions in this section to determine if you can improve the tool's look and usability.

1. Does each tool's design adhere to the AHRQ Publishing and Communications Guidelines and have the same branding and style?	❑ Yes ❑ No	
2. Does each tool address 508 compliance issues?[2]	❑ Yes ❑ No	
3. Does the tool appear accessible and easy to use?	❑ Yes ❑ No	
4. Does the tool have a visual focal point (logo, title, or design element)?	❑ Yes ❑ No	
5. Does the tool have an intentional and predictable grid with elements lining up vertically on the page? For example, do paragraphs start at 1" and all bulleted lists start at 2" from the border?	❑ Yes ❑ No	
6. Does the tool use common and easily readable fonts, such as Arial, Verdana, Tahoma, Garamond, or Times Roman?	❑ Yes ❑ No	

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[2] Section 508 Amendment to the Rehabilitation Act of 1973 requires Federal agencies to make their electronic and information technology accessible to people with disabilities. See www.section508.gov and Section 2 of the AHRQ Publishing and Communications Guidelines for more information and additional resources.

7. Are different fonts or sizes used to denote different levels of the organizational hierarchy?	❑ Yes	❑ No
8. Does the tool use emphasis typeface techniques, such as bold and italics, without overusing them?	❑ Yes	❑ No
9. Are the fill-in spaces on the tool large enough for users to comfortably enter information? If the toolkit is Web based, do the fields expand to accommodate any number of characters?	❑ Yes	❑ No
10. Are pages, items, or questions numbered to help users navigate?	❑ Yes	❑ No
11. Does the tool use bullets or numbers to list important information?	❑ Yes	❑ No
12. Does the tool use white space—the area not used for text, such as borders and the space between lines—to visually organize sections and items and make the tool more reader friendly?	❑ Yes ❑ Somewhat	❑ No
13. Does the tool use color and shading to help users navigate?	❑ Yes	❑ No
14. Does the tool use visual displays in addition to text, such as tables, lists, and graphics?	❑ Yes ❑ Somewhat	❑ No
▪ Do the visuals have descriptive titles?	❑ Yes	❑ No
▪ Do the visuals support the text and help communicate the message to users?	❑ Yes ❑ Somewhat	❑ No
▪ Are these visuals 508 compliant, i.e., do they contain text to make them accessible to individuals with disabilities?	❑ Yes ❑ Somewhat	❑ No
Language Considerations Clear and concise language aids in communicating your message. Use this section to ensure your grammar and word choice are appropriate for the tool. You may also consider having an editor review the product to ensure these considerations are addressed.		
1. Does the tool use clear and concise language that's free of jargon?	❑ Yes	❑ No
2. Does the tool use acronyms and abbreviations only when necessary, and spelled out on first use?	❑ Yes	❑ No
3. Does the tool use positive or simple negative sentence construction whenever possible? (for example: *Always include* or *never include* not *don't include*)	❑ Yes	❑ No
4. Does the tool use the active voice (for example: *consult stakeholders* not *stakeholders should be consulted*)?	❑ Yes	❑ No
5. Does the tool use personal pronouns (for example: *your* evaluation team)?	❑ Yes	❑ No
6. Does the tool use action verbs (for example: *assess* not *make an assessment*)?	❑ Yes	❑ No
7. Does the tool use gender-neutral words?	❑ Yes	❑ No
8. Does the tool use words and terms consistently?	❑ Yes	❑ No
9. Does the tool use lists or tables for several items or conditional statements (i.e., *if X, then Y*)?	❑ Yes	❑ No
10. Does the tool use correct spelling, grammar, and punctuation?	❑ Yes	❑ No

How To Present Your Toolkit to the End User on the Web

You have used the checklists to determine that your research findings are appropriate for translation into a toolkit and to determine how to develop and arrange the toolkit's contents. But there is still another essential step in completing the toolkit: determining how to present your toolkit to the end user on the Web. No matter how beneficial the

toolkit is, users won't know unless they are told simply and clearly what's in the toolkit and how to use it. Busy medical professionals need you to explain the toolkit's purpose, what it consists of, how it is organized, and how all the components fit together. They need your help understanding quickly why they should go further into the toolkit from its homepage, how to navigate around the hierarchy of pages, and which tools best meet their needs.

Here is general guidance for how to organize the Web page so it is accessible to the average Web user. Use a simple structure with no more than three or four main categories, with each category having levels of information that users can access through links. Use simple sentences, plain language, and short paragraphs in descriptions.

Home page/entry page/splash page
This page explains in a short paragraph at the top the toolkit's purpose– who should use it, what it's for, and why it's important. Then it shows an outline of what the site contains, typically using these divisions:

- How To Use the Toolkit
- Main modules or subject areas of the toolkit
- About the Toolkit Development

Your toolkit might require a different structure. Organize the modules/subject area(s) page(s) based on the amount and subject areas of the materials.

For example, AHRQ's **Toolkit for Reducing CAUTI in Hospitals** has a large number of materials divided into two main pages: Modules and Information for Specialty Audiences (which include emergency department nurses, for example). The modules page links to three modules, each divided into material type, and the Information for Specialty Audiences page divides its materials into three subject areas. In contrast, the **AHRQ Safety Program for End-Stage Renal Disease Facilities – Toolkit** has fewer materials; it consists of four modules that each feature slides, facilitator notes, videos, and tools.

Inside pages
- How To Use the Toolkit – explains in general terms what the toolkit components are and lists the product types, including tool types (e.g., pocket guides, checklists) and formats (e.g., Word, PDF, video, audio).

- Toolkit modules – presents the main subject areas, briefly describes them, and provides links to each subject area. Within each subject area page, present the materials by type (e.g., Guides, Tools, Archived Webinars, Slides, Videos). Provide a one-sentence description of each item and links to the item and the HTML version.

- About the Toolkit Development – explains how the toolkit was developed. Provide a one- or two-sentence description and links to these topics: Background, Project Partners, and Reports.